

MASSACHUSETTS STATE ETHICS COMMISSION
ONE ASHBURTON PLACE – RM 619
BOSTON MA 02108-1501
(617) 371-9500

STATEMENT OF FINANCIAL INTERESTS FOR CALENDAR YEAR 2008

Please provide the requested information. As required by G.L. c. 268B, the Financial Disclosure Law, you must answer all questions to the best of your knowledge. If your answer to any question is "none" or if any question is not applicable to you, check "Not Applicable". If extra space is needed to complete a response, attach additional pages, clearly noting to which question the information relates.

1: Reporting Data

| | |
|---|------------------|
| Person Reporting: | Deval L. Patrick |
| Address: | |
| City: | |
| State: | |
| Zip: | |
| Office Phone: | |
| Fax Number: | |
| Email: | |
| Name of spouse residing in your household: | |
| Names of dependent children residing in your household: | |

2: Candidate: I am a candidate for the following office:

√ Not Applicable

3: Positions Held

| | |
|----------------------------------|---|
| Agency in which you served: | Executive |
| Your Position: | Governor |
| Start Date: | January 4, 2007 |
| End Date if Applicable: | |
| Amount of Income Earned in 2008: | \$100,000 or more (actual 2008 - \$137,980) |

4: Other Government Position(s)

√ Not Applicable

5: Employment and Other Associations with Businesses and Non-Governmental Entities
(Including Non-Profit Organizations)

| | |
|-----------------------------------|--|
| Name of Business: | Texaco Group LLC |
| Address: | P.O. Box 6041 San Ramon, CA 94583 |
| Position Held: | Former Senior Executive (Resigned in 2001) |
| Filer or Immediate Family member: | Filer |
| Gross Income (Filer Only): | \$1,001 to 5,000 (actual 2008 - \$3,661) |

| | |
|-----------------------------------|---|
| Name of Business: | Ropes & Gray |
| Address: | One International Place Boston, MA 02110 |
| Position Held: | Partner |
| Filer or Immediate Family member: | Immediate Family Member |
| Gross Income (Filer Only): | |

| | |
|-----------------------------------|---------------------------------------|
| Name of Business: | United Way of Massachusetts Bay |
| Address: | 51 Sleeper Street Boston, MA 02210 |
| Position Held: | Director |
| Filer or Immediate Family member: | Immediate Family Member |
| Gross Income (Filer Only): | |

| | |
|-----------------------------------|--|
| Name of Business: | Jane Doe, Inc. |
| Address: | 14 Beacon Street – Suite 507 Boston, MA 02108 |
| Position Held: | Board Member |
| Filer or Immediate Family member: | Immediate Family Member |
| Gross Income (Filer Only): | |

| | |
|---------------------------|--|
| Name of Business: | The Posse Foundation, Inc. |
| Address: | 14 Wall Street – Suite 8A-60 New York, NY |
| Position Held: | Board of Directors |
| Filer or Immediate Family | |

Deval L. Patrick
Statement of Financial Interests

| | |
|----------------------------|-------------------------|
| member: | Immediate Family Member |
| Gross Income (Filer Only): | |

| | |
|-----------------------------------|---|
| Name of Business: | Epiphany School |
| Address: | 154 Centre Street Dorchester, MA 02124 |
| Position Held: | Board of Overseers |
| Filer or Immediate Family member: | Immediate Family Member |
| Gross Income (Filer Only): | |

| | |
|-----------------------------------|---|
| Name of Business: | Partners Healthcare |
| Address: | 101 Merrimac Street Boston, MA 02114 |
| Position Held: | Member of the Corporation |
| Filer or Immediate Family member: | Immediate Family Member |
| Gross Income (Filer Only): | |

| | |
|-----------------------------------|--|
| Name of Business: | Boston Symphony Orchestra |
| Address: | 301 Massachusetts Avenue Boston, MA 02115 |
| Position Held: | Board of Overseers |
| Filer or Immediate Family member: | Immediate Family Member |
| Gross Income (Filer Only): | |

| | |
|-----------------------------------|---|
| Name of Business: | MassEquality |
| Address: | 11 Beacon Street, Suite 1125 Boston, MA 02108-3011 |
| Position Held: | Intern |
| Filer or Immediate Family member: | Immediate Family Member |
| Gross Income (Filer Only): | |

6. Business Ownership/Equity

✓ Not Applicable

7: Transfer of Ownership/Equity Interests

✓ Not Applicable

8: Leaves of Absence

√ Not Applicable

9: Gifts

√ Not Applicable

10: Honoraria:

√ Not Applicable

11: Reimbursements:

√ Not Applicable

12. Commonwealth of Massachusetts: State or Local Government Securities

√ Not Applicable

13: Securities and Investments

| | <u>Issuer</u> | <u>Description</u> | <u>Owner</u> |
|---|--|--------------------|---------------|
| 1 | Delaware Dividend Income | Mutual Fund | Family Member |
| 2 | Legg Mason Partners Aggressive Growth FD | Mutual Fund | Family Member |

14: Creation of Business and Charitable Trusts

√ Not Applicable

15: Business and Charitable Trust Holdings

√ Not Applicable

16: Family Trusts

Securities and other investments are held in a "blind trust."

17: Creation of Realty Trusts

✓ Not Applicable

18: Realty Trust: Real Property Holdings

✓ Not Applicable

19: Realty Trust: Mortgage Obligations

✓ Not Applicable

20: Trusts: Purchases/Transfers of Property (In Massachusetts Only)

✓ Not Applicable

21: Trusts: Sales/Transfers of Property (In Massachusetts Only)

✓ Not Applicable

22: Real Property Owned in Massachusetts

| | |
|---------------------------|----------------------|
| Address: | |
| Description of Property: | Principal residence |
| Persons Holding Interests | |
| Record Owners: | Deval L. Patrick and |
| Assessed Value: | \$100,000 + |

| | |
|---------------------------|----------------------|
| Address: | |
| Description of Property: | Personal residence |
| Persons Holding Interests | |
| Record Owners: | Deval L. Patrick and |
| Assessed Value: | \$100,000 + |

23: Investment and Rental Properties

✓ Not Applicable

24: Real Property Acquisitions in Massachusetts during 2008

✓ Not Applicable

25: Real Property Sales in Massachusetts during 2008

√ Not Applicable

26: Mortgage Loan Information

| | |
|---|--|
| Primary Residence - Address of Property: | |
| Creditor Name: | SunTrust Banks |
| Creditor Address: | 303 Peachtree Street NE Atlanta, GA 30308 |
| Terms of Repayment Interest Rate: | 30-year, ARM note at 5.0% |
| Year Mortgage Due or Terminated: | 2033 |

| | |
|---|---|
| Primary Residence - Address of Property: | |
| Creditor Name: | Bank of America |
| Creditor Address: | 100 Federal Street Boston, MA 02110 |
| Terms of Repayment Interest Rate: | Home Equity Line of Credit, variable rate |
| Year Mortgage Due or Terminated: | Revolving Line of Credit |

| | |
|---|---|
| Address of Property: | |
| Creditor Name: | Berkshire Bank |
| Creditor Address: | 24 North Street Pittsfield, MA 01202 |
| Original Amount Borrowed (Filer Only): | \$100,000 + |
| Amount Owed: | \$100,000 + |
| Terms of Repayment Interest Rate: | 30-year, ARM note at 5.75% |
| Year Mortgage Due or Terminated: | 2037 |

27: Mortgage Receivable Information

√ Not Applicable


28: Other Creditor Information (each debt, loan, or other liability owed by you and/or any immediate family member)

√ Not Applicable

29: Debts Forgiven

✓ Not Applicable

30: Certification

I, , certify that:
(signature)

- I made a reasonably diligent effort to obtain reportable information concerning myself and IMMEDIATE FAMILY MEMBERS; and
- The information contained on this form is true and complete, to the best of my knowledge.

Submitted under the pains and penalties of perjury May 22, 2009
(date)

The following Immediate Family Members declined to disclose information which is necessary to complete this Statement fully and accurately:

(Not Applicable)

The following is/are the specific Question(s) for which answers were declined by each Immediate Family Member:

(Not Applicable)